

Patient names

- New table (colorful sheets are obsolete and Rob has removed them from desk to avoid confusion)
- **NEW CUSTOMERS:** All new orders we confirm will either have patient names or will be approved to process by Rob or Barry.
 - Patient name requirements will be a combination of the drug being ordered and the state where the facility is located. Sales is working on creating product sheets with detailed information about each item which will include pricing, special instructions and SKU#, patient name requirements.
- **EXISTING CUSTOMERS:**
 - ❖ **ALWAYS LOOK AT PREVIOUS ORDERS TO REVIEW IF PATIENT NAMES HAVE BEEN GIVEN.**
 - 1. Look at previous orders to see if patient names have been provided. If so, then keep processing as usual. If they have always given names and then fax an order with no names, contact **Rob** (not the sales rep) and explain the situation. If they have never given us pt names (even if they are on the new table) and they are not in NY, MA, GA or CO, process as usual.
 - 2. If a facility provides patient names and only gives first initial along with the last name, process the order **BUT** also contact the sales rep and Rob and let them know that we need the full name on future orders. Make a note on the order that you have e-mailed Rob regarding patient names.
 - 3. If facility is in a state that is on the new table and there is a **GOLD** sheet, give order to Barry to review.
 - 4. If facility is in a state that is not on the list and the folder has a **GOLD** sheet in it, please toss it and process as usual.
 - 5. If a facility has a green sticky note in their folder and they are in AL or IN, discard note.
 - 6. If a facility has a green sticky note in their folder and they are in MA, GA or NY, contact Rob.
- **EXISTING CUSTOMERS THAT SUPPLY PATIENT NAMES SEPARATELY FROM ORDER**

We have a few customers that fax us patient rosters separately from their order. On occasion, we need a new supply of names.

Anytime you see an account with this patient name set-up, please show it to Barry. He wants to review this process.

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